

**Joint Board for the Enrollment of Actuaries  
Advisory Committee on Actuarial Examinations**

**Membership Balance Plan**

1. **Name.** The Advisory Committee on Actuarial Examinations (Advisory Committee).
2. **Authority.** Agency authority.
3. **Mission/Function.** The purpose of the Advisory Committee is to provide advice and recommendations relative to the examination program of the Joint Board for the Enrollment of Actuaries (Joint Board). Advisory Committee members recommend the areas of knowledge to be tested on the Joint Board examinations, prepare and review exam questions, develop exams, and review examination results and recommend passing scores. In addition, Advisory Committee members provide advice on other areas related to the examinations, as requested by the Joint Board.
4. **Points of View.** The Advisory Committee consists of not more than 9 members. Each member is appointed as a Special Government Employee and has extensive experience in the actuarial profession. The Joint Board attempts to ensure maximum practicable representation on the Advisory Committee of most points of view extant in the enrolled actuary community. To that end, the Joint Board seeks to appoint members with expertise in one or more of the three main practice areas: small single employer plans, large single employer plans, and multiemployer plans. To the extent possible, the Joint Board selects several members from each of these practice areas. Membership balance is not static and may change depending on the work of the committee.

In determining the employment status of the Advisory Committee members, the Joint Board considered that members are selected primarily for their technical expertise rather than their representation of a specific interest, view, or bias. Furthermore, the Advisory Committee performs a governmental function by supporting the Joint Board's examination program, and the members report to the Chair of the Joint Board, a federal employee.

5. **Other Balance Factors.** To attain a balanced membership, the Joint Board limits the number of members employed by any one firm or affiliated with any one actuarial organization. In addition, to the extent possible, the Joint Board seeks geographic diversity of members.
6. **Candidate Identification Process.**
  - a. **Cross-section.** The Joint Board solicits applications for the Advisory Committee by placing a notice in the *Federal Register*, posting an announcement on its website, and asking several actuarial organizations to disseminate the notice and announcement to their respective members. In addition, the Joint Board solicits

nominees from the Society of Actuaries and the American Society of Pension Professionals and Actuaries. After receiving applications and recommendations, the Joint Board develops a list of qualified candidates. The Joint Board selects candidates based on various criteria, including whether the candidate has experience in one or more of the three main practice areas and whether selection of the candidate contributes to the overall membership balance of the Advisory Committee.

- b. **Agency staff involved.** Members of the Joint Board participate in the review and selection process.
  - c. **Vacancies.** At the time the Joint Board selects members for the Advisory Committee, it selects alternate members. Alternate members are selected according to the criteria used for regular members. Alternate members are ranked in order of preference and assigned alternate numbers based on that ranking. Alternate members are appointed to fill vacancies on the Advisory Committee according to the alternate number assigned.
  - d. **Term limits.** Each member is appointed for an initial 2-year term and may seek additional 2-year term appointments.
7. **Subcommittee Balance.** The Advisory Committee may form subcommittees (or subgroups) for any purpose consistent with the charter. Such subcommittees (or subgroups) report directly to the Advisory Committee and do not make recommendations directly to the Joint Board. The Federal Advisory Committee Act does not apply to any subcommittees (or subgroups) of the Advisory Committee (41 C.F.R. § 102-3.35).
8. **Date Prepared/Updated.** This Membership Balance Plan was initially prepared on September 25, 2012, updated on October 1, 2014, and reviewed on August 15, 2016.